

Quarterly Inbound Update & Full Year 2022

Q4 2022 and Full Year 2022

International Passenger Survey by the ONS

(Published 26th May 2023)



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Explore the 2022 data in more detail on the [VisitBritain website](#).

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1. Summary

Q4 2022 and Full Year 2022

Summary of key points (1)

- **Visits:**

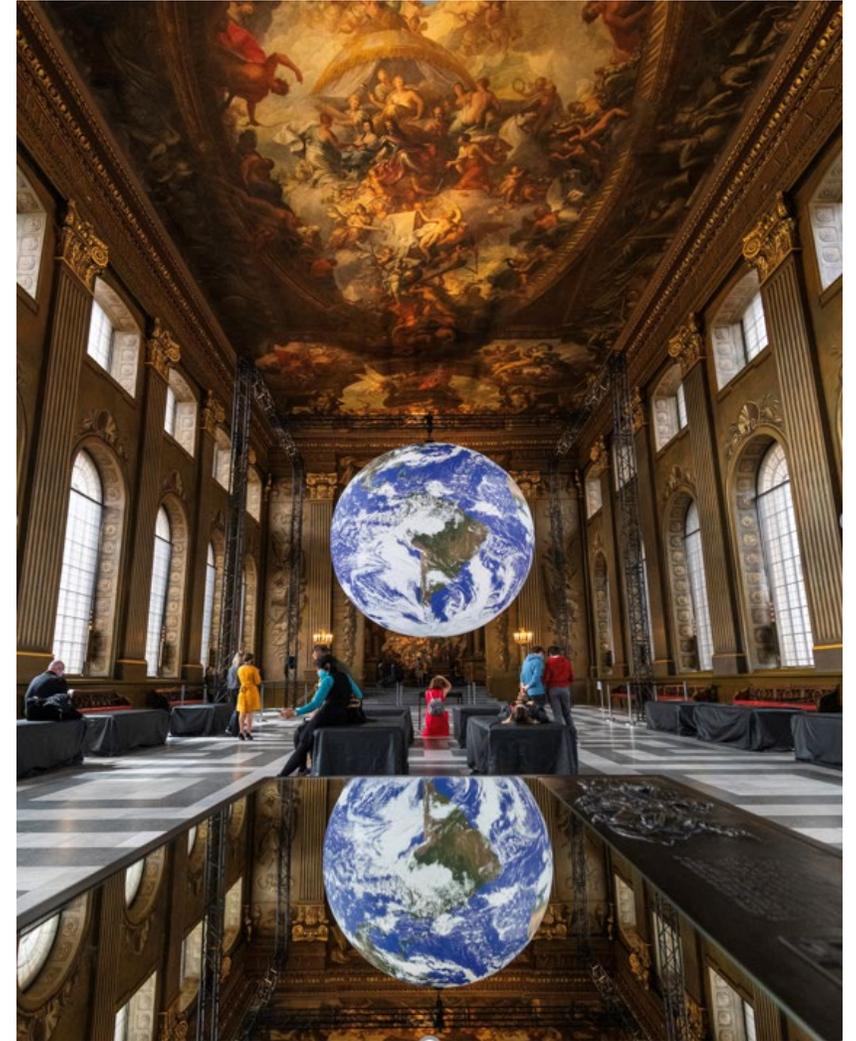
- In 2022, the UK welcomed 31.2m **visits** following two years of extremely low visits due to the impact of COVID-19.
- Visits in each quarter of 2022 increasingly neared pre-pandemic levels and overall visits were 24% below 2019 levels.

- **Spend:**

- Visitors **spent** £26.5bn during the 12 months of 2022, down 7% on 2019 (in nominal terms) and down 17% in real terms when taking inflation into account, with Q4 2022 reaching a record £7.7bn.
- The **average spend per visit** was £848 in 2022 vs £696 in 2019 (22% up in nominal terms, 8% up in real terms).

- **Nights:**

- In total, 262.9m **nights** were spent in the UK by inbound visitors, down 9% on 2019.
- Visitors stayed longer in the UK on average in 2022 vs 2019; 8.4 **nights per visit** in 2022 vs 7.1 nights per visit in 2019.



Summary of key points (2)

- **Journey Purpose:**

- There were 12.1 million **holiday** visits to the UK throughout the year, down 28% on 2019 (39% of total inbound visits). Holiday spend returned to be the highest source of inbound spend in 2022 with these visitors spending £11.6bn, down 13% on 2019.
- Inbound visits to **friends and relatives** in the UK has seen the quickest recovery in 2022 with 11.8 million visits, 5% below 2019. They accounted for a similar share of total inbound visits to holiday visits at 38% (vs 30% in 2019). Spend from VFR visits surpassed pre-pandemic levels in 2022, reaching a new record of £7.6bn spend, up 18% on 2019.
- In 2022, there were 354,000 **study** visits to the UK, down 41% on 2019. Spend from study visitors fluctuated quite a bit in 2022 but reached £1.0bn from Jan-Dec 2022, down 28% on 2019.
- Similarly, **business** visits were also down 41% in 2022 vs 2019 reaching 5.1m visits. Business spend recovered to £5.0bn in 2022, down 14% on 2019.
- All other visits under '**miscellaneous**' contributed 1.9m visits in 2022, down 17% on 2019 whilst spend reached £1.4bn, down 6% on 2019.

- **Regions/Markets:**

- There were 21.0m visits from **Europe** in 2022, down 23% on 2019. These visits accounted for 67% of total inbound visits to the UK. Inbound spend from Europe reached £11.7bn in 2022, down 6% on 2019 (44% of total inbound spend).
- In 2022, visits from **North America** surpassed pre-pandemic levels by 2% contributing 5.5m visits to total inbound visits (just shy of the 5.54m record of 2017). Spend from North America also surpassed pre-pandemic levels by 40% at £6.9bn spend (a new record).
- The **Rest of the World** accounted for 15% of all inbound visits and saw the weakest recovery in 2022 with 4.8m visits down 42% on 2019. These visitors spent £8.0bn in 2022, recovering at a slower pace vs other regions with spend down 29% on 2019.
- The top inbound markets for visits in 2022 were the **USA, France, the Irish Republic, Germany and Spain**.
- The top inbound markets for spend in 2022 were the **USA, France, Germany, Australia and Spain**.

2. Latest inbound UK and market statistics

Full year 2022

2022 Headlines

Total	2018	2019	2020	2021	2022	% change vs 2019
Visits (000)	40,283	40,857	11,101	6,384	31,244	-24%
Spend (£m)	£26,508	£28,448	£6,210	£5,646	£26,497	-7%
Nights (000)	291,324	289,628	-	93,522	262,864	-9%

- In 2022, the UK welcomed 31.2m **visits** following two years of extremely low visits due to the impact of Covid-19. Visits in each quarter of 2022 increasingly neared pre-pandemic levels and overall visits were 24% below 2019 levels.
- Visitors **spent** £26.5bn during the 12 months of 2022, down 7% on 2019 (in nominal terms) with Q4 2022 reaching a record £7.7bn. Taking inflation into account, visitor spend in 2022 was 17% below 2019 levels, equivalent to £23.5bn in 2019 prices.
- In total, 262.9m **nights** were spent in the UK by inbound visitors, down 9% on 2019.
- The **average spend per visit** was £848 in 2022 vs £696 in 2019, up 22% in nominal terms and 8% in real terms.
- Visitors stayed longer in the UK on average in 2022 vs 2019; 8.4 **nights per visit** in 2022 vs 7.1 nights per visit in 2019.

2022 Journey Purpose – Visits (000)

Visits (000)	2018	2019	2020	2021	2022	% change vs 2019
Holiday	16,337	16,905	4,362	1,175	12,092	-28%
VFR	12,328	12,427	2,469	3,456	11,781	-5%
Business	8,789	8,670	3,447	1,222	5,149	-41%
Study	572	600	-	119	354	-41%
Miscellaneous (Excl. study)	2,258	2,256	-	411	1,869	-17%

- Overall in 2022, the majority of inbound visitors came to the UK for a holiday. There were 12.1 million **holiday** visits to the UK throughout the year, down 28% on 2019 (accounting for 39% of total inbound visits vs 41% in 2019).
- Inbound visits to **friends and relatives** in the UK has seen the quickest recovery in 2022 with 11.8 million visits, 5% below 2019. They accounted for a similar share of total inbound visits to holiday visits at 38% (vs 30% in 2019).
- In 2022, there were 354,000 **study** visits to the UK, down 41% on 2019.
- Similarly, **business** visits were also down 41% in 2022 vs 2019 reaching 5.1m visits.
- All other visits under '**miscellaneous**' contributed 1.9m visits in 2022, down 17% on 2019.

2022 Journey Purpose – Spend (£m)

Spend (£m)	2018	2019	2020	2021	2022	% change vs 2019
Holiday	£12,194	£13,341	-	£1,284	£11,567	-13%
VFR	£6,233	£6,408	-	£2,395	£7,558	18%
Business	£5,115	£5,823	-	£939	£4,982	-14%
Study	£1,553	£1,442	-	£529	£1,039	-28%
Miscellaneous (Excl. study)	£1,413	£1,435	-	£499	£1,352	-6%

- **Holiday** spend returned to be the highest source of inbound spend in 2022 with these visitors spending £11.6bn, down 13% on 2019. Those visiting the UK for a holiday accounted for 44% of total inbound spend in 2022.
- Spend from those **visiting friends and relatives** surpassed pre-pandemic levels in 2022, reaching a new record of £7.6bn spend, up 18% on 2019. Spend from this group made up 29% of total inbound spend.
- **Business** spend recovered to £5.0bn in 2022, down 14% on 2019 (19% of total spend).
- Spend from **study** visitors fluctuated quite a bit in 2022 but reached £1.0bn from Jan-Dec 2022, down 28% on 2019.
- All other spend under '**miscellaneous**' contributed £1.4bn in 2022, down 6% on 2019.

2022 Global Regions – Visits (000)

Visits (000)	2018	2019	2020	2021	2022	% change vs 2019
Total Europe	26,693	27,293	7,988	4,834	20,980	-23%
→ EU Total	24,294	24,828	-	4,410	18,959	-24%
→ EU 15	19,980	20,328	-	3,516	15,621	-23%
→ Other EU	4,314	4,500	-	895	3,338	-26%
→ Rest of Europe	2,399	2,465	-	423	2,021	-18%
North America	5,424	5,373	1,171	792	5,483	2%
Rest of World	8,167	8,191	1,942	759	4,781	-42%

- There were 21.0m visits from **Europe** in 2022, down 23% on 2019. These visits accounted for 67% of total inbound visits to the UK. Visits from the **EU15** markets recovered to 77% of 2019 levels (or -23%) in 2022 vs **Rest of Europe** which recovered to 82% of 2019 levels (or -18%).
- In 2022, visits from **North America** surpassed pre-pandemic levels by 2% contributing 5.5m visits to total inbound visits (just shy of the 5.54m record of 2017).
- The **Rest of the World** accounted for 15% of all inbound visits and saw the weakest recovery in 2022 with 4.8m visits down 42% on 2019. However, there is much variation between markets in this group – please see next slide and explore our market level data on the [VisitBritain website](#).

2022 Global Regions – Spend (£m)

Spend (£m)	2018	2019	2020	2021	2022	% change vs 2019
Total Europe	£11,327	£12,407	-	£2,897	£11,682	-6%
→ EU Total	£9,717	£10,661	-	£2,464	£9,962	-7%
→ EU 15	£8,204	£8,733	-	£2,029	£8,573	-2%
→ Other EU	£1,512	£1,928	-	£435	£1,389	-28%
→ Rest of Europe	£1,611	£1,746	-	£433	£1,721	-2%
North America	£4,706	£4,918	-	£932	£6,896	40%
Rest of World	£10,475	£11,123	-	£1,817	£7,918	-29%

- Inbound spend from **Europe** reached £11.7bn in 2022, down 6% on 2019 (44% of total inbound spend). 73% of European spend came from the **EU15** markets (£8.6bn) seen to be recovering at a faster rate vs **Other EU** markets (-2% on 2019 vs -28% on 2019). Those visiting from the **Rest of Europe** spend £1.7bn, down 2% on 2019.
- Spend from **North America** surpassed pre-pandemic levels by 40% at £6.9bn spend (a new record).
- Visitors from the **Rest of the World** spent £8.0bn in from January to December 2022, recovering at a slower pace vs other regions with spend down 29% on 2019.

2022 Market Highlights – Visits (000)

Visits (000)	2019	2020	2021	2022	% change vs 2019	Record?
Australia	1,063	-	24	723	-32%	No
Belgium	1,135	-	159	679	-40%	No
Brazil	291	-	19	267	-8%	No
Canada	874	-	128	897	3%	No
China**	883	-	15	47	-95%	No
Denmark	691	-	102	566	-18%	No
France	3,561	-	677	2,830	-21%	No
Germany	3,233	-	390	2,233	-31%	No
GCC*	1,211	-	233	791	-35%	No
Hong Kong**	409	-	12	112	-73%	No
India	692	-	58	516	-25%	No
Irish Republic	2,851	-	708	2,509	-12%	No
Italy	2,197	-	256	1,313	-40%	No
Japan**	389	-	10	115	-70%	No
Netherlands	1,987	-	273	1,632	-18%	No
New Zealand**	188	-	9	126	-33%	No
Norway	647	-	75	547	-16%	No
Poland	1,651	-	337	1,345	-19%	No
Romania	902	-	191	634	-30%	No
Russia**	199	-	23	44	-78%	No
Spain	2,319	-	525	2,012	-13%	No
Sweden	789	-	117	630	-20%	No
Switzerland	926	-	164	862	-7%	No
USA	4,499	-	663	4,587	2%	No

- The top inbound markets for visits in 2022 were the USA, France, the Irish Republic, Germany and Spain.
- Canada and the US surpassed pre-pandemic levels in 2022 whilst some North East Asian markets were lagging behind.
- You can explore more market level data on the [VisitBritain website](#).

- **Sample advice**

- **These markets have very low sample and have been shown only to give a sense of the decline
- Please see sample sizes by market and sample advice on slide 39

International Passenger Survey by the ONS 2019 & 2022. GCC* includes Bahrain, Kuwait, Oman, Qatar, Saudi Arabia and the United Arab Emirates (UAE). Please note caveats to data on slide 38. Some datapoints are unavailable for 2020, please see slide 38.

2022 Market Highlights – Spend (£m)

Spend (£m)	2019	2020	2021	2022	% change vs 2019	Record?
Australia	£1,174	-	£35	£1,118	-5%	No
Belgium	£359	-	£120	£402	12%	Yes
Brazil	£250	-	£25	£311	25%	No
Canada	£734	-	£148	£934	27%	Yes
China**	£1,710	-	£141	£183	-89%	No
Denmark	£329	-	£62	£309	-6%	No
France	£1,398	-	£420	£1,575	13%	Yes
Germany	£1,567	-	£235	£1,392	-11%	No
GCC*	£2,606	-	£710	£2,041	-22%	No
Hong Kong**	£560	-	£43	£235	-58%	No
India	£753	-	£116	£764	2%	Yes
Irish Republic	£958	-	£294	£1,027	7%	No
Italy	£1,109	-	£174	£798	-28%	No
Japan**	£369	-	£19	£164	-56%	No
Netherlands	£796	-	£145	£894	12%	Yes
New Zealand**	£171	-	£17	£198	15%	No
Norway	£437	-	£63	£418	-4%	No
Poland	£498	-	£108	£415	-17%	No
Romania	£439	-	£114	£277	-37%	No
Russia**	£182	-	£19	£47	-74%	No
Spain	£977	-	£297	£1,055	8%	No
Sweden	£400	-	£78	£393	-2%	No
Switzerland	£570	-	£143	£647	14%	No
USA	£4,184	-	£783	£5,962	42%	Yes

- The top inbound markets for spend in 2022 were the USA, France, Germany, Australia and Spain. The GCC would rank 2nd if we were to count it as 'one market'.
- Many markets surpass pre-pandemic levels but spend does not take into account inflation.
- You can explore more market level data on the [VisitBritain website](#).
- **Sample advice**
- **These markets have very low sample and have been shown only to give a sense of the decline
- Please see sample sizes by market and sample advice on slide 39

International Passenger Survey by the ONS 2019 & 2022. Please note caveats to data on slide 38. GCC* includes Bahrain, Kuwait, Oman, Qatar, Saudi Arabia and the United Arab Emirates (UAE). All values and percentage changes in spend are in nominal terms. Some datapoints are unavailable for 2020, please see slide 38.

3. Latest inbound UK and market statistics

Q4 2022 (October to December)



Quarterly 2022 Headlines

Total	Q1 2022	% change vs. Q1 2019	Q2 2022	% change vs. Q2 2019	Q3 2022	% change vs. Q3 2019	Q4 2022	% change vs. Q4 2019
Visits (000)	3,743	-55%	7,957	-23%	9,946	-16%	9,598	-7%
Spend (£m)	£2,852	-41%	£6,847	-1%	£9,066	-1%	£7,732	2%
Nights (000)	36,558	-28%	63,065	-9%	91,255	-11%	71,987	7%

- Inbound **visits** to the UK continued to recover to pre-pandemic levels (i.e. 2019) in the last quarter of 2022 reaching 9.6 million visits, down 7% on Q4 2019.
- Visitors **spent** £7.7bn during Q4 2022, surpassing pre-pandemic levels by 2% (in nominal terms). Taking inflation into account, visitor spend was equivalent to £6.6bn in Q4 2019 prices, down 12% on Q4 2019.
- In total, 72.0 million **nights** were spent in the UK during Q4, up 7% on Q4 2019.
- The **average spend per visit** from October to December 2022 was £806 vs £734 in the same months in 2019.
- The **average length of stay** (nights per visit) was 7.5 nights in Q4 2022 vs 6.5 in Q4 2019.

Quarterly Journey Purpose – Visits (000)

Visits (000)	Q1 2022	% change vs. Q1 2019	Q2 2022	% change vs. Q2 2019	Q3 2022	% change vs. Q3 2019	Q4 2022	% change vs. Q4 2019
Holiday	944	-68%	3,295	-27%	4,306	-20%	3,547	-13%
VFR	1,738	-35%	2,856	-5%	3,468	1%	3,718	12%
Business	802	-62%	1,289	-41%	1,449	-33%	1,609	-27%
Study	42	-48%	85	-44%	124	-45%	103	-27%
Miscellaneous (Excl. study)	218	-56%	432	-17%	599	-13%	620	12%

- Inbound **holiday** visits to the UK continued to recover to pre-pandemic levels in Q4 (October to December) 2022 with 3.5 million visits, down 13% on Q4 2019. These visits accounted for 37% of all inbound visits in the last quarter of the year.
- Those **visiting friends and relatives** in the UK contributed 3.7 million visits to inbound tourism in Q4 2022, making up the largest proportion of visits at 39%. VFR visits for this quarter surpassed 2019 levels by 12% and set a new Q4 record.
- **Business** visits continued to increase into Q4 to 1.6 million visits, down 27% on Q4 2019.
- **Study** visits have been recovering at the slowest pace out of all journey purposes but improved in Q4 reaching 103,000 visits, down 27% on Q4 2022.
- All other visits under '**miscellaneous**' contributed 620,000 visits in Q4 2022, up 12% on Q4 2019.

Quarterly Journey Purpose – Spend (£m)

Spend (£m)	Q1 2022	% change vs. Q1 2019	Q2 2022	% change vs. Q2 2019	Q3 2022	% change vs. Q3 2019	Q4 2022	% change vs. Q4 2019
Holiday	£865	-58%	£3,141	-4%	£4,442	-6%	£3,118	-5%
VFR	£1,088	-6%	£1,753	12%	£2,542	26%	£2,174	32%
Business	£572	-52%	£1,344	-9%	£1,416	-6%	£1,647	1%
Study	£168	45%	£286	4%	£274	-48%	£311	-41%
Miscellaneous (Excl. study)	£159	-38%	£323	9%	£389	-5%	£481	2%

- **Holiday** spend (in nominal terms) neared pre-pandemic levels in Q4 reaching £3.1bn, down 5% on Q4 2019.
- Spend from those **visiting friends and relatives** continued to set new records into Q4 2022 at £2.2bn, around one third higher than 2019.
- **Business** spend recovered to 2019 levels in Q4 2022 (up 1% on Q4 2022) with these visitors spending £1.6bn from October to December.
- Spend from **study** visitors has fluctuated quite a bit in 2022 and saw a weak Q4 with £311m spend down 41% on Q4 2022.
- All other spend under '**miscellaneous**' recovered to pre-pandemic levels (up 2%) at £481m.

Quarterly Global Regions – Visits (000)

Visits (000)	Q1 2022	% change vs. Q1 2019	Q2 2022	% change vs. Q2 2019	Q3 2022	% change vs. Q3 2019	Q4 2022	% change vs. Q4 2019
Total Europe	2,821	-53%	5,189	-25%	6,085	-15%	6,886	-5%
→ EU Total	2,570	-54%	4,699	-25%	5,473	-16%	6,218	-4%
→ EU 15	2,063	-54%	3,954	-24%	4,542	-16%	5,062	-4%
→ Other EU	506	-53%	746	-31%	931	-17%	1,156	-4%
→ Rest of Europe	251	-50%	490	-19%	612	-5%	668	-6%
North America	415	-54%	1,587	3%	2,157	24%	1,324	11%
Rest of World	508	-63%	1,181	-39%	1,705	-42%	1,388	-27%

- Each quarter of 2022 saw a steady increase in visits from **Europe** peaking at 6.9 million visits in Q4 2022 (down 5% on Q4 2019). Visits across all European groupings saw similar recovery in Q4 2022 vs Q4 2019.
- In Q4 2022, visits from **North America** continued to surpass pre-pandemic levels to reach a record 1.3 million visits (up 11% vs Q4 2022).
- Visits from the **Rest of the World** were the slowest region to recover to 2019 levels in 2022. There were 1.4 million visits from the Rest of the World in Q4 2022, down 27% vs Q4 2019.

Quarterly Global Regions – Spend (£m)

Spend (£m)	Q1 2022	% change vs. Q1 2019	Q2 2022	% change vs. Q2 2019	Q3 2022	% change vs. Q3 2019	Q4 2022	% change vs. Q4 2019
Total Europe	£1,413	-37%	£2,773	-6%	£3,608	-3%	£3,889	11%
→ EU Total	£1,245	-36%	£2,352	-8%	£3,074	-3%	£3,291	10%
→ EU 15	£1,088	-32%	£2,055	-1%	£2,667	2%	£2,763	14%
→ Other EU	£157	-54%	£297	-38%	£407	-26%	£528	-6%
→ Rest of Europe	£169	-42%	£421	5%	£534	-2%	£597	17%
North America	£447	-45%	£2,113	45%	£2,734	71%	£1,601	54%
Rest of World	£992	-44%	£1,960	-21%	£2,725	-30%	£2,242	-26%

- Visitors from **Europe** spent a record £3.9bn in Q4 2022, up 11% on Q4 2019 (in nominal terms). The **EU15** markets contributed £2.8bn to European spend (up 14% on Q4 2019) vs £597m from the **Rest of Europe** (up 17% on Q4 2019), both Q4 records.
- **North America** spend also surpassed pre-pandemic levels in Q4, reaching new records of £1.6bn (up 54% vs Q4 2019).
- Visitors from the **Rest of the World** spent £2.2bn in Q4 2022, down 26% on Q4 2019.

Quarterly Market Highlights – Visits (000)

Visits (000)	Q1 2022	% change vs Q1 2019	Q2 2022	% change vs Q2 2019	Q3 2022	% change vs Q3 2019	Q4 2022	% change vs Q4 2019
Australia	45	-68%	176	-35%	322	-23%	179	-23%
Belgium	107	-55%	164	-45%	224	-27%	184	-37%
Brazil	45	-39%	62	2%	91	0%	68	6%
Canada	58	-56%	272	8%	366	21%	201	7%
China**	2	-98%	12	-94%	18	-95%	15	-91%
Denmark	54	-54%	108	-42%	184	-1%	220	10%
France	462	-43%	829	-11%	697	-22%	842	-9%
Germany	208	-69%	604	-24%	748	-21%	673	-17%
GCC*	129	-40%	196	-21%	251	-44%	215	-29%
Hong Kong**	3	-96%	19	-82%	43	-70%	47	-49%
India	56	-53%	143	-36%	176	-24%	141	20%
Irish Republic	417	-36%	645	-10%	715	0%	731	-4%
Italy	162	-66%	287	-48%	391	-38%	473	-11%
Japan**	7	-90%	17	-82%	48	-59%	43	-57%
Netherlands	188	-53%	454	-1%	485	-19%	504	-4%
New Zealand**	5	-78%	33	-38%	52	-32%	36	-3%
Norway	45	-68%	114	-24%	198	21%	190	-3%
Poland	178	-54%	289	-30%	381	-10%	497	14%
Romania	114	-55%	129	-41%	163	-20%	228	1%
Russia**	11	-58%	3	-94%	16	-76%	13	-72%
Spain	244	-53%	468	-26%	540	-1%	759	23%
Sweden	61	-69%	131	-32%	204	5%	235	15%
Switzerland	107	-46%	239	-2%	248	20%	268	-4%
USA	357	-53%	1,315	2%	1,791	24%	1,123	12%

- The top 5 inbound markets for visits in Q4 2022 were the USA, France, Spain, the Irish Republic and Germany.
- You can explore more market level data on the [VisitBritain website](https://www.visitbritain.com).

- **Sample advice**

- **These markets have very low sample and have been shown only to give a sense of the decline
- Please see sample sizes by market and sample advice on slide 37

Quarterly Market Highlights – Spend (£m)

Spend (£m)	Q1 2022	% change vs Q1 2019	Q2 2022	% change vs Q2 2019	Q3 2022	% change vs Q3 2019	Q4 2022	% change vs Q4 2019
Australia	£88	-38%	£299	-11%	£468	13%	£263	-8%
Belgium	£55	-8%	£107	45%	£109	-9%	£132	24%
Brazil	£49	-24%	£65	37%	£115	19%	£83	99%
Canada	£38	-72%	£296	35%	£375	50%	£225	72%
China**	£11	-95%	£42	-89%	£74	-88%	£57	-88%
Denmark	£24	-53%	£57	-40%	£109	36%	£118	16%
France	£265	1%	£394	34%	£432	3%	£483	15%
Germany	£112	-53%	£383	-10%	£503	-3%	£394	2%
GCC*	£364	-26%	£495	9%	£603	-32%	£579	-25%
Hong Kong**	£4	-97%	£33	-77%	£104	-48%	£94	-15%
India	£69	-35%	£186	-19%	£270	-10%	£239	104%
Irish Republic	£174	-16%	£271	26%	£277	33%	£304	-7%
Italy	£122	-48%	£135	-41%	£271	-32%	£270	9%
Japan**	£7	-86%	£32	-61%	£73	-49%	£51	-44%
Netherlands	£83	-28%	£243	27%	£289	5%	£279	32%
New Zealand**	£10	-41%	£40	20%	£71	-14%	£77	96%
Norway	£31	-59%	£90	20%	£168	15%	£129	-9%
Poland	£33	-60%	£89	-18%	£126	-14%	£167	4%
Romania	£36	-66%	£65	-52%	£70	-21%	£106	-1%
Russia**	£7	-59%	£3	-95%	£13	-75%	£24	-54%
Spain	£106	-42%	£236	-9%	£313	8%	£400	63%
Sweden	£45	-43%	£76	-25%	£137	31%	£136	16%
Switzerland	£67	-38%	£190	53%	£211	28%	£179	4%
USA	£409	-40%	£1,818	46%	£2,359	75%	£1,376	51%

- The top 5 inbound markets for spend in Q4 2022 were the USA, France, Spain, Germany and the Irish Republic. The GCC would rank 2nd if were to count it as 'one market'.
- You can explore more market level data on the [VisitBritain website](#).
- **Sample advice**
- **These markets have very low sample and have been shown only to give a sense of the decline
- Please see sample sizes by market and sample advice on slide 37

International Passenger Survey by the ONS 2019 & 2022. Please note caveats to data on slide 38. All values and percentage changes in spend are in nominal terms. GCC* includes Bahrain, Kuwait, Oman, Qatar, Saudi Arabia and the United Arab Emirates (UAE).

3. Detailed quarterly trends

Detailed quarterly trend – Visits

Please see notes on slide 38 when interpreting 2020, 2021 and 2022 data

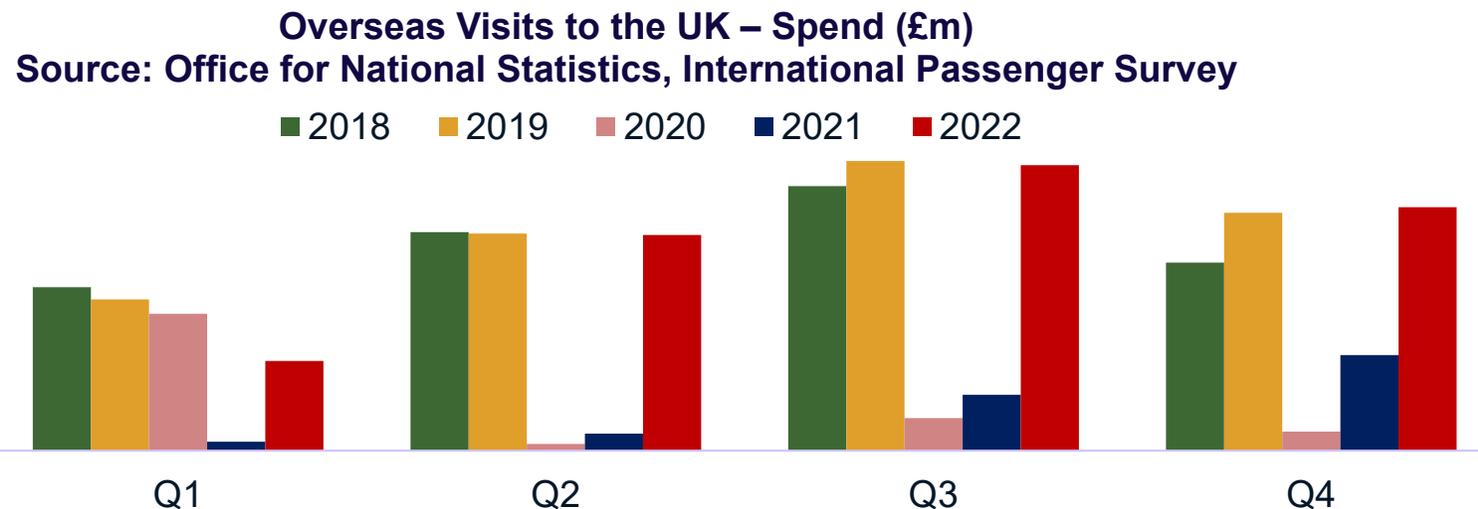


Years	Q1 (Jan-Mar)	Q2 (Apr-Jun)	Q3 (Jul-Sep)	Q4 (Oct-Dec)
2018	8,547	10,521	11,536	9,679
2019	8,332	10,364	11,864	10,297
2020	6,994	398	2,322	1,386
2021	245	346	2,040	3,753
2022	3,743	7,957	9,946	9,598

Note: Visits in thousands. [Long term trends showing percentage change year-on-year by quarter and more is available here.](#)

Detailed quarterly trend – Spend

Please see notes on slide 38 when interpreting 2020, 2021 and 2022 data



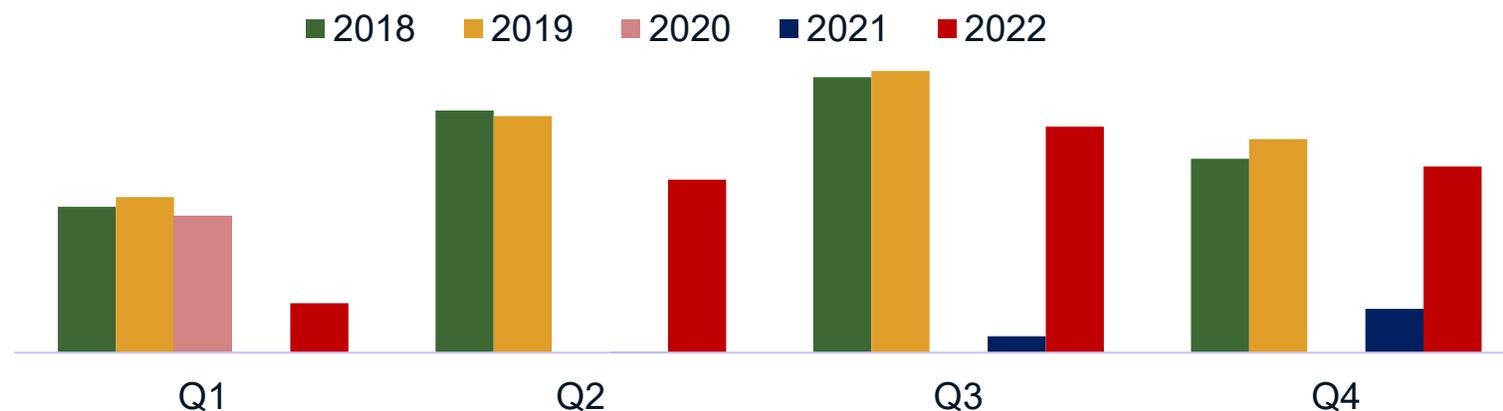
Years	Q1 (Jan-Mar)	Q2 (Apr-Jun)	Q3 (Jul-Sep)	Q4 (Oct-Dec)
2018	5,194	6,939	8,401	5,974
2019	4,805	6,896	9,193	7,555
2020	4,344	218	1,037	611
2021	287	545	1,775	3,039
2022	2,852	6,847	9,066	7,732

Note: Visits in thousands. [Long term trends showing percentage change year-on-year by quarter and more is available here.](#)

Detailed quarterly trend by journey purpose - holiday

Please see notes on slide 38 when interpreting 2020, 2021 and 2022 data

Overseas Visits to the UK – Holiday Visits (000)
Source: Office for National Statistics, International Passenger Survey



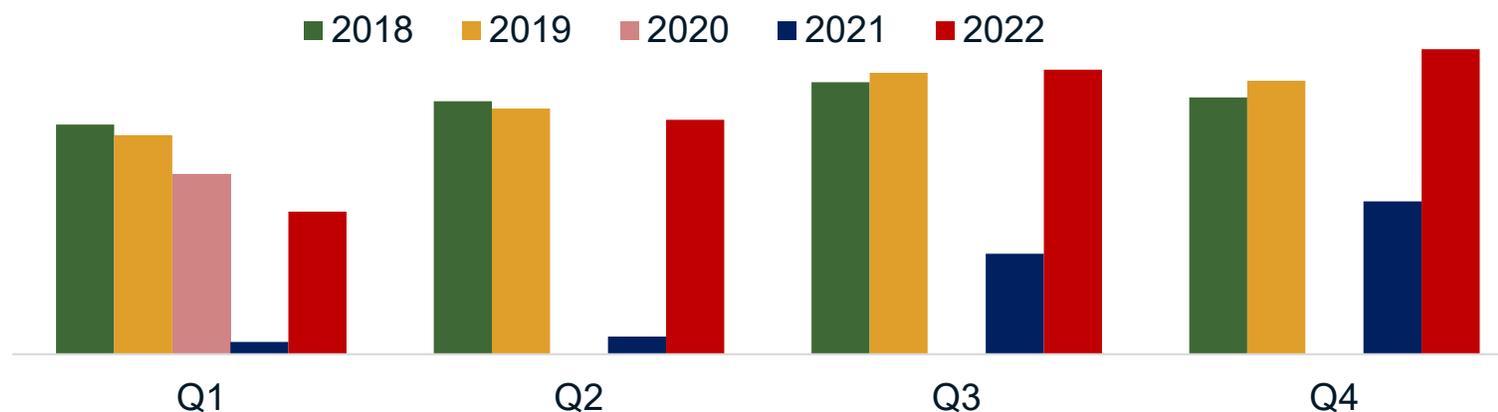
Years	Q1 (Jan-Mar)	Q2 (Apr-Jun)	Q3 (Jul-Sep)	Q4 (Oct-Dec)
2018	2,780	4,614	5,249	3,694
2019	2,965	4,508	5,365	4,068
2020	2,600	-	-	-
2021	8	17	313	837
2022	944	3,295	4,306	3,547

Note: Visits in thousands. [Long term trends showing percentage change year-on-year by quarter and more is available here.](#)

Detailed quarterly trend by journey purpose - VFR

Please see notes on slide 38 when interpreting 2020, 2021 and 2022 data

Overseas Visits to the UK – Visits to Friends and Relatives (000)
Source: Office for National Statistics, International Passenger Survey



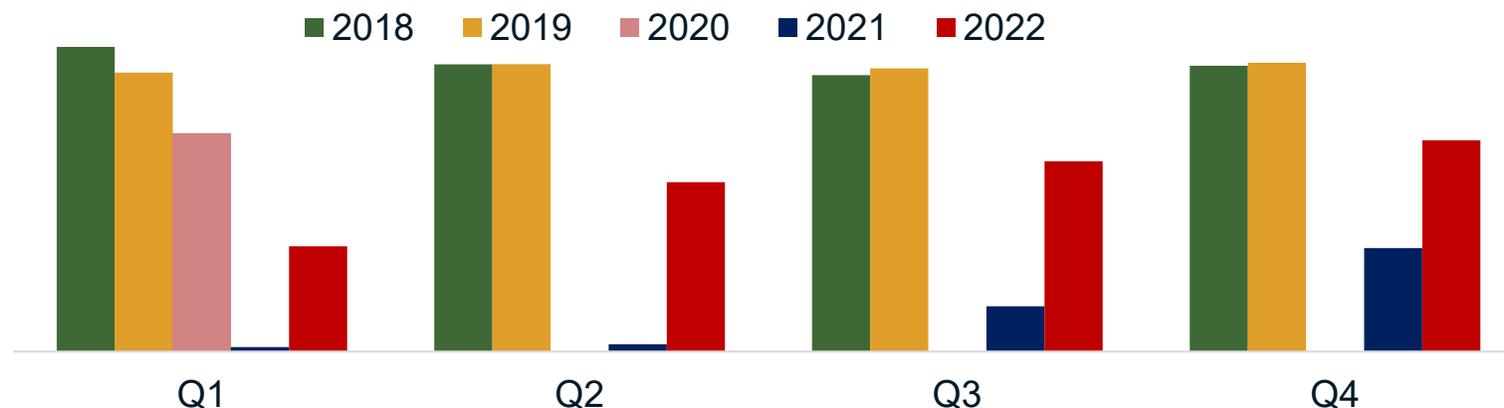
Years	Q1 (Jan-Mar)	Q2 (Apr-Jun)	Q3 (Jul-Sep)	Q4 (Oct-Dec)
2018	2,799	3,084	3,315	3,130
2019	2,670	2,995	3,430	3,333
2020	2,195	-	-	-
2021	151	216	1,225	1,864
2022	1,738	2,856	3,468	3,718

Note: Visits in thousands. [Long term trends showing percentage change year-on-year by quarter and more is available here.](#)

Detailed quarterly trend by journey purpose - business

Please see notes on slide 38 when interpreting 2020, 2021 and 2022 data

Overseas Visits to the UK – Business Visits (000)
Source: Office for National Statistics, International Passenger Survey



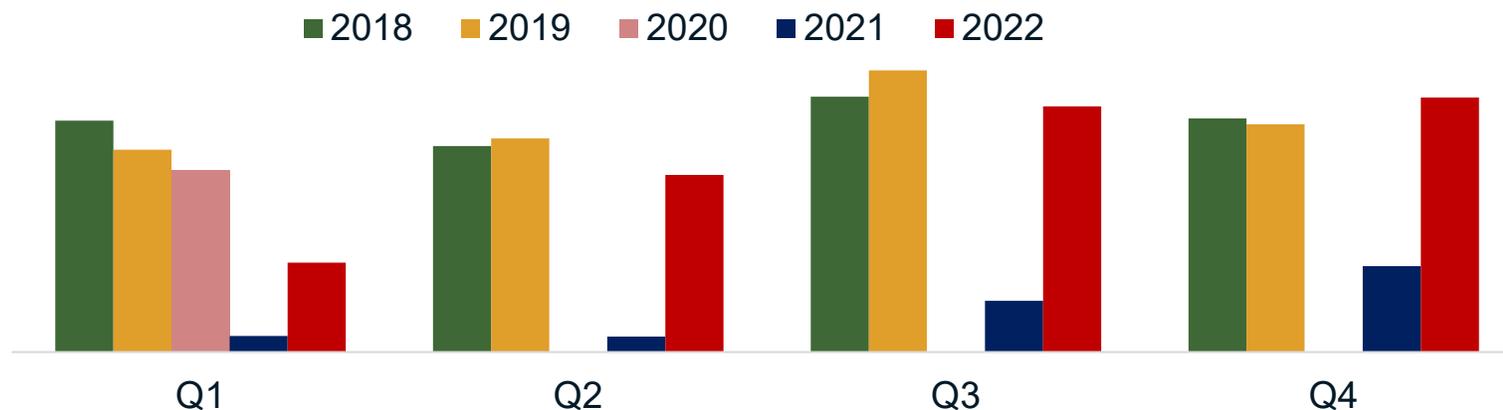
Years	Q1 (Jan-Mar)	Q2 (Apr-Jun)	Q3 (Jul-Sep)	Q4 (Oct-Dec)
2018	2,320	2,187	2,105	2,176
2019	2,124	2,189	2,157	2,200
2020	1,662	-	-	-
2021	34	56	344	788
2022	802	1,289	1,449	1,609

Note: Visits in thousands. [Long term trends showing percentage change year-on-year by quarter and more is available here.](#)

Detailed quarterly trend by journey purpose - misc

Please see notes on slide 38 when interpreting 2020, 2021 and 2022 data

Overseas Visits to the UK – Misc visits (excludes short-term study, 000)
Source: Office for National Statistics, International Passenger Survey

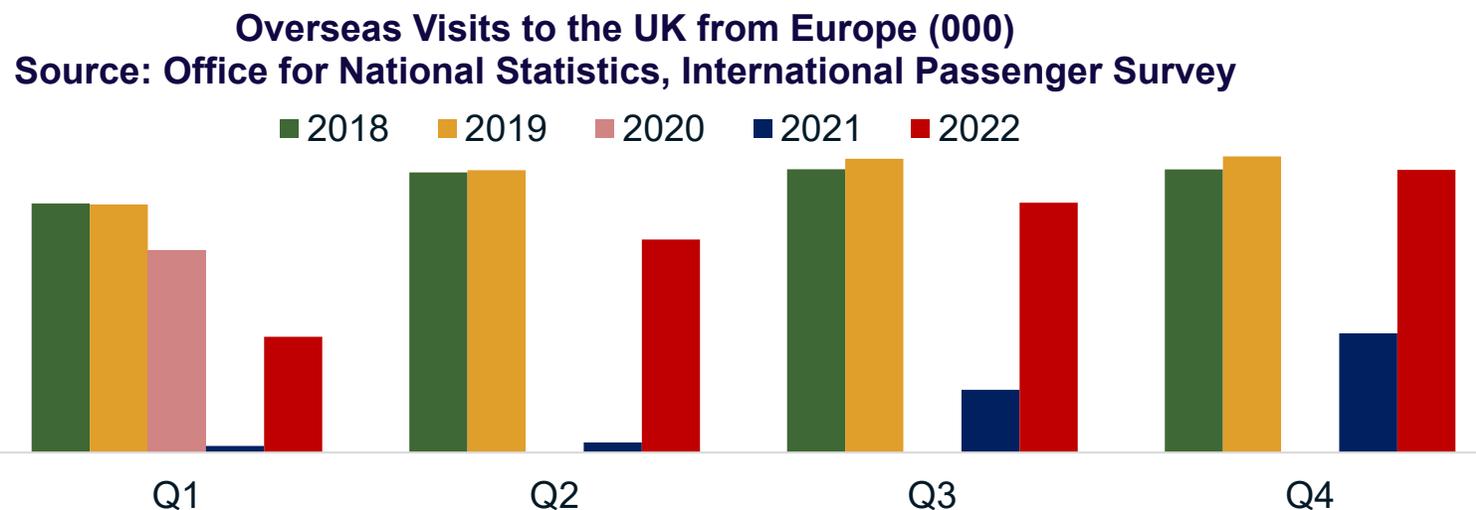


Years	Q1 (Jan-Mar)	Q2 (Apr-Jun)	Q3 (Jul-Sep)	Q4 (Oct-Dec)
2018	564	502	622	569
2019	493	521	687	555
2020	444	-	-	-
2021	39	38	125	209
2022	218	432	599	620

Note: Visits in thousands. [Long term trends showing percentage change year-on-year by quarter and more is available here.](#)

Detailed quarterly trend by global region - Europe

Please see notes on slide 38 when interpreting 2020, 2021 and 2022 data

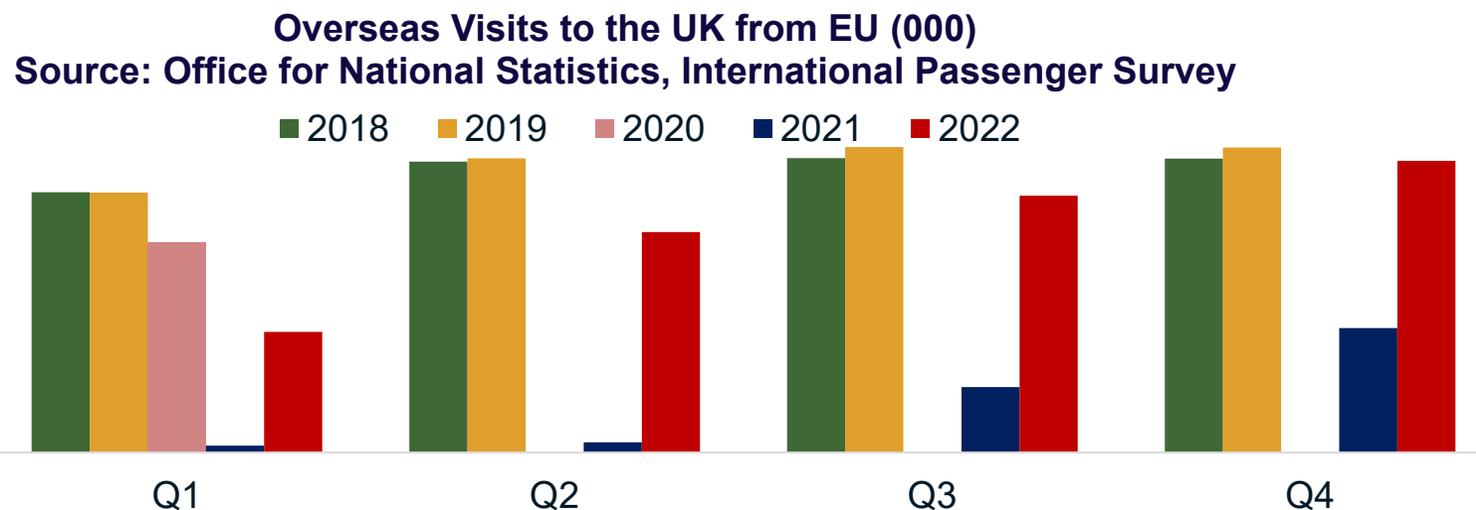


Years	Q1 (Jan-Mar)	Q2 (Apr-Jun)	Q3 (Jul-Sep)	Q4 (Oct-Dec)
2018	6,065	6,824	6,904	6,899
2019	6,044	6,879	7,156	7,215
2020	4,926	-	-	-
2021	158	242	1,528	2,904
2022	2,821	5,189	6,085	6,886

Note: Visits in thousands. [Long term trends showing percentage change year-on-year by quarter and more is available here.](#)

Detailed quarterly trend by global region - EU

Please see notes on slide 38 when interpreting 2020, 2021 and 2022 data



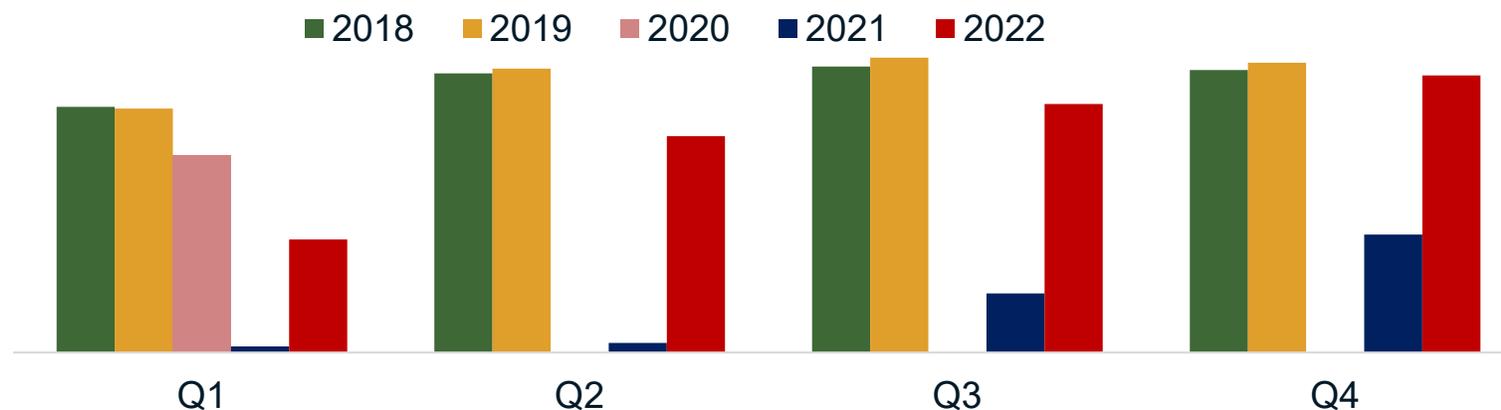
Years	Q1 (Jan-Mar)	Q2 (Apr-Jun)	Q3 (Jul-Sep)	Q4 (Oct-Dec)
2018	5,549	6,202	6,277	6,266
2019	5,543	6,272	6,512	6,502
2020	4,472	-	-	-
2021	147	216	1,395	2,653
2022	2,570	4,699	5,473	6,218

Note: Visits in thousands. [Long term trends showing percentage change year-on-year by quarter and more is available here.](#)

Detailed quarterly trend by global region - EU15

Please see notes on slide 38 when interpreting 2020, 2021 and 2022 data

Overseas Visits to the UK from EU15 (000)
Source: Office for National Statistics, International Passenger Survey



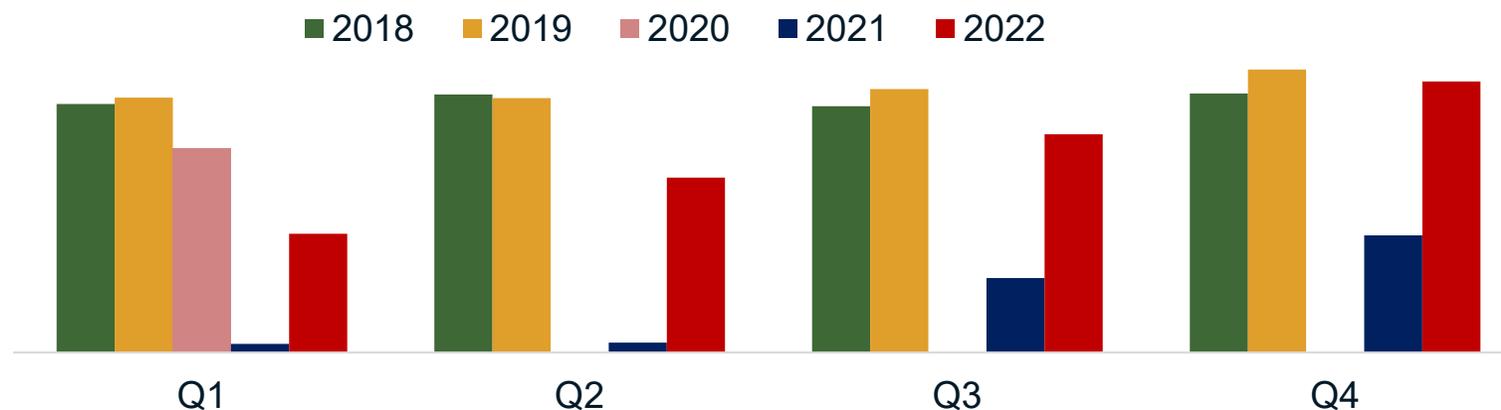
Years	Q1 (Jan-Mar)	Q2 (Apr-Jun)	Q3 (Jul-Sep)	Q4 (Oct-Dec)
2018	4,489	5,102	5,227	5,162
2019	4,456	5,187	5,389	5,295
2020	3,603	-	-	-
2021	111	173	1,078	2,154
2022	2,063	3,954	4,542	5,062

Note: Visits in thousands. [Long term trends showing percentage change year-on-year by quarter and more is available here.](#)

Detailed quarterly trend by global region - EU Other

Please see notes on slide 38 when interpreting 2020, 2021 and 2022 data

Overseas Visits to the UK from EU Other (000)
Source: Office for National Statistics, International Passenger Survey



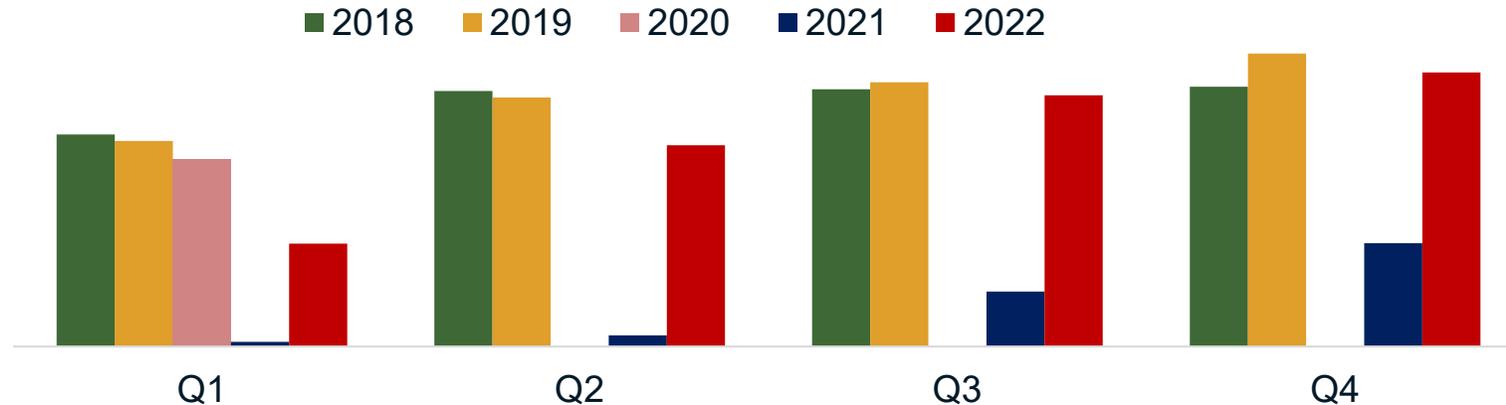
Years	Q1 (Jan-Mar)	Q2 (Apr-Jun)	Q3 (Jul-Sep)	Q4 (Oct-Dec)
2018	1,059	1,100	1,050	1,104
2019	1,086	1,085	1,123	1,206
2020	869	-	-	-
2021	36	42	317	499
2022	506	746	931	1,156

Note: Visits in thousands. [Long term trends showing percentage change year-on-year by quarter and more is available here.](#)

Detailed quarterly trend by global region – Rest of Europe

Please see notes on slide 38 when interpreting 2020, 2021 and 2022 data

Overseas Visits to the UK from Rest of Europe (000)
Source: Office for National Statistics, International Passenger Survey



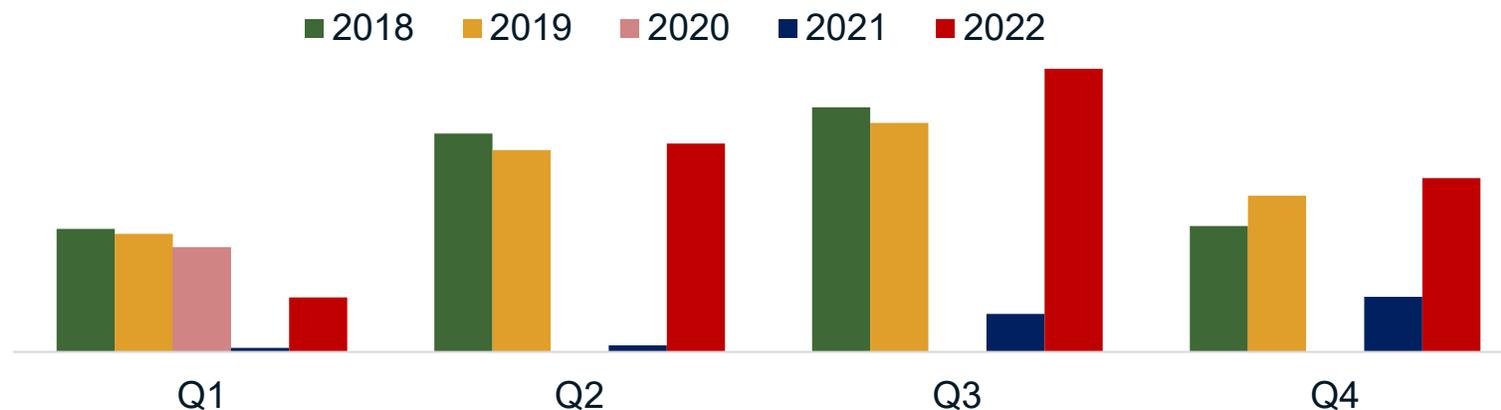
Years	Q1 (Jan-Mar)	Q2 (Apr-Jun)	Q3 (Jul-Sep)	Q4 (Oct-Dec)
2018	517	622	627	633
2019	501	607	644	714
2020	455	-	-	-
2021	11	27	134	252
2022	251	490	612	668

Note: Visits in thousands. [Long term trends showing percentage change year-on-year by quarter and more is available here.](#)

Detailed quarterly trend by global region - North America

Please see notes on slide 38 when interpreting 2020, 2021 and 2022 data

Overseas Visits to the UK from North America (000)
Source: Office for National Statistics, International Passenger Survey



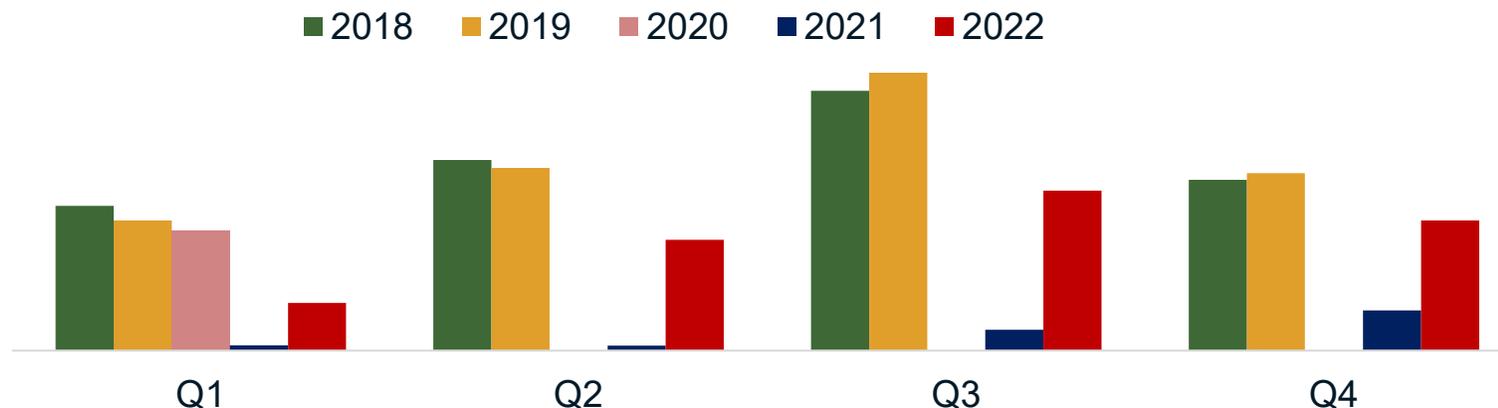
Years	Q1 (Jan-Mar)	Q2 (Apr-Jun)	Q3 (Jul-Sep)	Q4 (Oct-Dec)
2018	938	1,663	1,864	959
2019	900	1,537	1,745	1,191
2020	794	-	-	-
2021	31	51	289	421
2022	415	1,587	2,157	1,324

Note: Visits in thousands. [Long term trends showing percentage change year-on-year by quarter and more is available here.](#)

Detailed quarterly trend by global region - Rest of the World

Please see notes on slide 38 when interpreting 2020, 2021 and 2022 data

Overseas Visits to the UK from Rest of the World (000)
Source: Office for National Statistics, International Passenger Survey



Years	Q1 (Jan-Mar)	Q2 (Apr-Jun)	Q3 (Jul-Sep)	Q4 (Oct-Dec)
2018	1,544	2,033	2,769	1,821
2019	1,388	1,948	2,963	1,891
2020	1,274	-	-	-
2021	56	53	222	428
2022	508	1,181	1,705	1,388

Note: Visits in thousands. [Long term trends showing percentage change year-on-year by quarter and more is available here.](#)

3. About this data

About this data

This report is based on the latest International Passenger Survey (IPS) data released by the Office for National Statistics (ONS) on the morning of **26th May 2023**. This data refers to 2022, and due to the impact of COVID-19 restrictions, there are some caveats to the data noted on slide 38. Please note the ONS will be pausing monthly publications for Jan-Mar 2023 so the next data release will be Q1 2023.

The IPS data is based on interviews with a sample of departing visitors. The number interviewed varies but is typically around 3,000 per month. Sample sizes at the quarterly level for some analysis and comparisons can be low and results should be treated with caution, especially for spending. Please refer to the [ONS website](#) for information on confidence levels.

Please also note:

- All data is sourced from the International Passenger Survey by the Office for National Statistics.
- All figures quoted are not “seasonally adjusted”.
- Numbers in some tables / charts may not sum due to rounding.
- All values and percentage changes in spend are in nominal terms (i.e. not taking inflation into account).
- From 2021, data excludes the Irish land border data

Refer to the [ONS website](#) for more on IPS methodology and UK outbound travel.

Please visit the [VisitBritain research webpage](#) for more detail on inbound tourism to the UK.

Important notice for interpreting data

The International Passenger Survey (IPS) was suspended on 16 March 2020 due to the coronavirus (COVID-19) pandemic. Interviewing initially began at UK airports at the start of 2021, though the IPS remained suspended at some sea ports and train stations during the year. To produce statistics for the periods impacted the Office for National Statistics (ONS) have applied the following processes to the data since March 2020:

- **March 2020** - With the data collected for most of March when the IPS was running the ONS had part of the data needed for the month. To produce estimates for the full month of March the ONS worked on the assumption that passenger characteristics in the second, unsampled, half of the month were represented by those sampled in the first half.
- **April – December 2020 (Q2, Q3, Q4 2020)** - The travel and tourism figures for this period are based entirely on administrative sources and modelling as no data was collected during this period. In producing these results the ONS have made assumptions that some previous trends have continued, for example, the proportions of passengers travelling for business or holidays.
- **2021** – The ONS were unable to restart interviewing at Eurotunnel (but continued at Eurostar) in Q4 2021 due to COVID-19 restrictions. The ONS has used passenger numbers to model the Eurotunnel data for this quarter. Data for those travelling via Dover was only collected from Q3 2021. In addition, no estimates are included for any travel across the Irish border. Please see [our 2021 inbound data page](#) for more information.
- **January to June 2022** – The ONS were unable to restart interviewing at Eurotunnel (but continued at Eurostar) during this period due to COVID-19 restrictions. The ONS has used passenger numbers to model the Eurotunnel data for Q1-Q2 2022. The ONS restarted IPS interviews at all ports from July 2022. Please see our [2022 inbound page](#) for more information.

Please [refer to the ONS website for the official release and more information on IPS methodology and UK outbound travel](#)

Sample size

Sample by country of residence	Q1 2022	Q2 2022	Q3 2022	Q4 2022	2022
Australia	161	442	525	311	1,440
Belgium	133	187	217	248	785
Brazil	99	102	112	103	416
Canada	197	498	563	340	1,598
China	5	14	29	19	67
Denmark	119	182	174	212	687
France	582	957	757	1,102	3,398
Germany	486	924	880	833	3,123
GCC*	331	365	298	259	1,253
Hong Kong	10	46	56	77	189
India	106	223	230	174	733
Irish Republic	1,038	1,103	852	974	3,967
Italy	277	340	302	380	1,299
Japan	25	37	60	61	183
Netherlands	388	662	578	563	2,191
New Zealand	16	66	93	62	237
Norway	132	213	204	231	780
Poland	303	383	279	330	1,295
Romania	187	171	140	151	649
Russia	26	6	12	7	51
Spain	562	624	524	746	2,456
Sweden	156	282	239	265	942
Switzerland	254	324	295	297	1,170
USA	976	2,630	2,459	2,115	8,180

- **Sample advice** – If the sample is less than 30 we do not recommend use of this data. For sample sizes between 30 and 100 we recommend the data be treated as indicative. Sample sizes over 100 are more reliable.

Time period	Sample
Q1 2022	8,097
Q2 2022	12,934
Q3 2022	11,670
Q4 2022	11,694
2022	44,395

Visits (000)	Q1 2022	Q2 2022	Q3 2022	Q4 2022
Holiday	1,789	4,695	4,618	4,255
VFR	1,462	2,126	1,496	1,824
Business	3,804	4,411	3,950	4,093
Study	432	845	710	624
Miscellaneous (Excl. study)	85	122	148	109

Definitions

Regions:

- **Total Europe** includes **EU15** (Austria, Belgium, Denmark, France, Finland, Germany, Greece, Irish Republic, Italy, Luxembourg, Netherlands, Portugal, Spain and Sweden); **Other EU** (Bulgaria, Cyprus (South), Croatia, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Malta, Poland, Romania, Slovakia and Slovenia (note that Croatia has been included in the 'Other EU' category since it joined in July 2013; before July 2013 this group was labelled as A12) and **Rest of Europe** (European countries outside the EU (including Russia, Norway and Switzerland). Before July 2013 Croatia was also included here, but from July 2013 appears in Other EU)
- **North America** - Canada (including Greenland and St Pierre et Miquelon), USA (including Puerto Rico and US Virgin Islands)
- **Rest of World** – Countries outside Europe and North America (Africa, Asia, Central America, Middle East, Oceania, South America)

Journey purpose:

- **VFR** - Visiting Friends and Relatives
- **Miscellaneous visits** - includes those for short term study, to attend sports events, for personal shopping, health or religious purposes, accompanying others and many more

Other:

- **Visit** - all departing visits from overseas residents (including those who may be UK nationals but live elsewhere, excluding other nationals who have been in the UK for 12 months or longer)
- **Spend** - the amount visitors report spending in the UK during their stay
- **YoY** - Year on Year

Quarterly Inbound Update & Full Year 2022

Q4 2022 and Full Year 2022

International Passenger Survey by the ONS

(Published 26th May 2023)

